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External environment transformation of Ukraine's tourist enterprises during the crisis

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Purpose – to identify trends in Ukraine's tourism enterprises' external environment to increase their competitiveness and stability in the relevant industry market.

Design/Method/Approach of the research. Theoretical generalization, method of abstraction, expert assessments, PEST-analysis, factor analysis, graphical method.

Findings. The research studies the changes in the external environment of tourist enterprises during the pandemic crisis. The critical factors of such enterprises' external environment are revealed based on considering their importance and the influence direction on the competitiveness of tourist business units. The paper covers the most significant negative and positive trends of changes in Ukraine's tourist enterprises' external environment. The authors provided recommendations for strategic planning of tourist business units' competitiveness.

Practical implications. The research results allow identifying areas for increasing the competitiveness of national tourism enterprises and effectively adapting to the external environment's transformations during the crisis in the globalized social and economic space.

Originality/Value. Based on the expert assessment, the authors proposed an expanded factors list of the external environment of national tourism enterprises, which, in contrast to the existing ones, consider the crisis's negative consequences. PEST-analysis clusters of environmental factors allowed to identify with a significant positive or negative impact on the competitiveness of tourism enterprises.

Research limitations/Future research. The research results provide a basis for further study of the external macro- and micro-environment of tourism enterprises at the local, regional, and national levels. And for element-by-element SWOT-analysis of tourism enterprises during the pandemic crisis.

Paper type – theoretical.

Keywords: competitiveness; tourism business; macro-environment; crisis management.

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Трансформація зовнішнього середовища туристичних підприємств України в умовах кризи

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Мета роботи – виявити тенденції у зміні зовнішнього середовища туристичних підприємств України для підвищення їхньої конкурентоспроможності та стійкості на відповідному галузевому ринку.

Дизайн/Метод/План дослідження. Теоретичне узагальнення, метод абстракції, експертні оцінки, PEST-аналіз, факторний аналіз, графічний метод.

Результати дослідження. Досліджено зміни в макросередовищі туристичних підприємств в умовах кризи, спричиненої пандемією. Виявлено ключові фактори зовнішнього оточення таких підприємств на основі врахування їхньої вагомості та напряму впливу на конкурентоспроможність туристичних бізнес-одиниць. Наведено найбільш істотні негативні та позитивні тенденції змін в зовнішньому оточенні туристичних підприємств України. Надано рекомендації стосовно стратегічного планування конкурентоспроможності туристичних бізнес-одиниць.

Практичне значення дослідження. Результати дослідження дозволяють виявити напрямки підвищення конкурентоспроможності вітчизняних туристичних підприємств і ефективно адаптуватись до трансформацій у зовнішньому середовищі, спричинених кризовими явищами в глобалізованому соціально-економічному просторі.

Оригінальність/Цінність/Наукова новизна дослідження. На основі експертного оцінювання запропоновано розширений перелік факторів зовнішнього середовища вітчизняних туристичних підприємств, який, на відміну від існуючих, враховує негативні наслідки кризи. Із застосуванням PEST-аналізу виявлені кластери факторів зовнішнього середовища, які чинять істотний позитивний або негативний вплив на конкурентоспроможність туристичних підприємств.

Обмеження дослідження/Перспективи подальших досліджень. Результати дослідження, наведеного в даній статті, створюють підґрунтя для подальшого дослідження зовнішнього макро- та мікросередовища туристичних підприємств на локальному, регіональному та загальнодержавному рівні, а також для проведення поелементного SWOT-аналізу туристичних підприємств в умовах кризи, спричиненої пандемією.

Тип статті – теоретичний.

Ключові слова: конкурентоспроможність; туристичний бізнес; макросередовище; антикризове управління.

Трансформация внешней среды туристических предприятий Украины в условиях кризиса

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Цель работы – выявить тенденции в изменении внешней среды туристических предприятий Украины для повышения их конкурентоспособности и устойчивости на соответствующем отраслевом рынке.

Дизайн/Метод/План исследования. Теоретическое обобщение, метод абстракции, экспертное оценивание, PEST-анализ, факторный анализ, графический метод.

Результаты исследования. Исследованы изменения в макросреде туристических предприятий в условиях кризиса, вызванного пандемией. Выявлены ключевые факторы внешнего окружения таких предприятий на основе учета их значимости и направления влияния на конкурентоспособность туристических бизнес-единиц. Приведены наиболее существенные негативные и позитивные тенденции изменений во внешнем окружении туристических предприятий Украины. Даны рекомендации относительно стратегического планирования конкурентоспособности туристических бизнес-единиц.

Практическое значение исследования. Результаты исследования позволяют выявить направления повышения конкурентоспособности отечественных туристических предприятий и эффективно адаптироваться к трансформациям во внешней среде, вызванных кризисными явлениями в глобальном социально-экономическом пространстве.

Оригинальность/Ценность/Научная новизна исследования. На основе экспертного оценивания предложен расширенный перечень факторов внешней среды отечественных туристических предприятий, который, в отличие от существующих, учитывает негативные последствия кризиса. С применением PEST-анализа выявлены кластеры факторов внешней среды, которые оказывают существенное положительное или отрицательное влияние на конкурентоспособность туристических предприятий.

Ограничение исследования/Перспективы дальнейших исследований. Результаты исследования, приведенного в данной статье, создают основу для дальнейшего исследования внешней макро- и микросреды туристических предприятий на локальном, региональном и общегосударственном уровне, а также для проведения поэлементного SWOT-анализа туристических предприятий в условиях кризиса, вызванного пандемией.

Тип статьи – теоретический.

Ключевые слова: конкурентоспособность; туристический бизнес; макросреда; антикризисное управление.

1. Introduction

Nowadays, it is impossible to exaggerate the importance and impact of world tourism on the national GDP formation and employment. Tourism is a global economic activity implemented worldwide, and the world economy crucial sector that generates exports increases tax revenues and stimulates capital investment. According to the World Tourism Organization UNWTO (*World Tourism Barometer*, 2020), at the end of 2019, tourism exports accounted for 5% of total exports of goods and services, with 7% tourism world GDP. The direct and indirect contribution of tourism to the employment rate was about 8%.

In 2018, the UNWTO expected that the number of international tourists should reach 1.8 billion by 2030 or earlier. As of the end of 2019, the tourism sector grew faster than the international economy and international trade (*World Tourism Barometer*, 2020). However, the COVID-19 pandemic dispelled and reconsidered such optimistic expectations.

International, regional and local travel restrictions immediately affected national economies, including all tourism systems, namely international travel, domestic tourism, seasonal work, and other segments such as air transport, cruises, public transport, cafes and the hotel and restaurant sector, festivals, sporting events (Gössling et al., 2020).

There is currently a list of researchers studying the impact of the COVID-19 pandemic using previous data, including Wen et al. (2020), with proposals for possible multidisciplinary ways to study the pandemic effects. Ying et al. (2020) focus on the link between similar crises in the tourism sector and the consumption of non-renewable natural resources and emphasize the need to include when developing forecasting models Gössling et al. (2020) emphasize the similarity of COVID-19 crises with previous crises in the tourism industry. Some scientists, such as Hoque et al. (2020), examine the crisis effects on Chinese and global tourism and predict that negative trends will persist even in the medium term.

Considering the tourism sector crisis management, several scholars naturally highlight the factors influencing the tourism sector's development and stability (Detotto, 2020). The public policy impact in the industry and the political stability importance for the tourism industry sustainability are among the most discussed topics in the scientific literature. The political stability importance and its impact on the tourism attractiveness level mainly studied in Bosnia and Herzegovina (Causevic et al., 2013), in Lebanon (Issa et al., 2006), and in Ireland (O'Brien, 2012). The tourism business's external environment legal factors are mainly considered in close connection with the political ones. Thus, Komlichenko (2014) emphasizes that "a significant factor in the tourism industry development is the regulatory framework. In economic globalization, Ukraine's accession to the World Trade Organization, there is a need to unify national legislation in tourism per international cooperation requirements. " It should be noted that most of the provisions of the current Law of Ukraine "On Tourism" (Pro turyzm, 1995) have been in operation since 1995 and requires updating.

Shelemetieva (2019), Horal et al. (2015) considered the public administration quality problem in national tourism in detail, with the list of negative factors of the economy's tourism sector's external environment, in particular, corruption and the significant economy's shadow sector. Horal et al. (2015) note that national recreational complexes' external environment factors should include international ones, such as the competition possibility of national recreational areas with world counterparts. Among the external environment macro-factors of recreational areas with negative trends in the national tourism market, the authors include qualified personnel, the national tourism product advertising in the national and international market of tourism services, availability and completeness of the domestic tourism facilities database. Given the above, it is noteworthy that domestic tourism's support becomes especially crucial during a pandemic, which is also

confirmed by the materials (*Natsionalnyi Institut Stratehichnykh Doslidzhen*, 2020).

Horina (2016) studied the external environment changes in the global tourism market based on spatial polarization. Under spatial and polarization factors influencing the tourist services market formation, the author determines the entire set of environmental factors inherent in a particular pole of growth - territorial, informational, resource, institutional. Mazaraki et al. (2016) studied the external environment transformation of the tourism business regarding innovation attractiveness. The authors note that the post-crisis recovery dynamism of the world economy and, in particular, the tourism sector is slowing down, thus increasing innovation and new developments. Therefore, the authors include the external environment key factors, among others, the Internet's impact on the tourism business development, the unsatisfactory funding level for innovation, the technology transfer complicated process.

Kantsemir et al. (2016) proposed a situational approach to choosing the tourism market's external environment's key factors. The authors emphasize that the transformation of the service enterprise's external environment, including tourism enterprises, is influenced by one-time difficult-to-predict events typical of the social and economic globalized space. Therefore, to increase the changes' predictability in the services market, the authors propose to include a marketing group (buyers, suppliers, competitors, PR, etc.) in the list of critical environmental factors.

Shpak (2015) emphasized the importance of considering regional environmental safety as one of the external environmental, technological factors of tourism enterprises. We believe that during a pandemic, this factor is especially important.

However, the COVID-19 pandemic scale suggests that a return to the usual ways of doing business, including tourism, as in previous epidemics, is a precarious decision. There is a need to study the transformation of the global tourism system and maintaining the competitiveness of tourism business units during the crisis. That raises several research needs and related issues, such as whether restricting movement across borders increases the domestic tourism role in the long run, how behavioral responses and demand among tourists change in the short and long term, and whether tourism impacts low-income countries were disproportionately large.

The main pandemic conclusion should become the transformation and sustainability of tourism at all levels - from local to global. Since tourism is essential for the GDP and employment formation, we consider it appropriate to study changes in the external environment of national tourism business units and identify the most appropriate ways to maintain and increase their competitiveness against the global crisis.

2. Problem statement

Despite the significant scientific achievements in the external environment research, the tourism business, its transformation problem during the crisis caused, in particular, by the pandemic remains poorly developed. At present, strategic planning of national tourism enterprises is impossible, excluding such changes.

The research purpose identifies changes in Ukraine's tourism enterprises' external macro-environment during the pandemic and reserves to increase their competitiveness and resilience in the relevant industry market.

3. Research methods

The used methods to conduct this study include both general and special ones, namely: theoretical generalization and the abstraction method - in the current state study of the national economy's tourism industry; expert assessment - in determining

the factors, and assessing their impact on the environment of Ukraine's tourist enterprises; factor analysis - in determining such factors significance; PEST-analysis - to assess the state and level of environmental factors influence of Ukraine's tourist enterprises, graphical method - to study environmental factors clusters of tourist business units.

4. Results

Leading scientists in the tourism industry as an economic activity (Gössling, 2002; Scott et al., 2015), and health scientists (Bloom et al., 2019; Fauci et al., 2012), as well as international and government institutions (WorldBank, 2012), have emphasized, the pandemics significant threat to society and tourism in recent decades.

The leading causes of the growing pandemic threat in the 21st century are:

- population growth and its increasing mobility;
- trends of people's urbanization and concentration;
- food production industrialization;
- increase in consumption of higher-order products, including meat;
- global transport network development acts as vectors for spreading pathogens (Labonte et al., 2011).

Within countries, the virus has affected almost all parts of the hospitality chain. Over the past 20 years, global tourism has experienced a list of challenges, including the terrorist attack in the United States on September 11 (2001), the outbreak of the Severe Acute Respiratory Syndrome (SARS) (2003), the global economic crisis that unfolded in 2008-2009, and the Middle East Respiratory Syndrome (MERS) (2015). However, none of them led to a long-term decline in global tourism development, and only SARS (-0.4%) and the global economic crisis (-4.0%) led to a fall in international tourism revenues (Worldbank, 2020). That would lead to the conclusion that tourism as a system is quite resistant to external shocks, but the negative impact and recovery of the social and economic sphere after the COVID-19 pandemic against this background will become unprecedented (Polyzos et al., 2020).

Nowadays, international, national, and regional institutions focus on developing an action plan to overcome the crisis. Thus, the NISD materials "On the development of tourism in Ukraine in conditions of increased epidemic risks" (Natsionalnyi Institut Stratehichnykh Doslidzhen', 2020) confirm significant changes in the consumers' behavioral responses of tourist services, such as service are increasing individualization, principal contactless payment, and delivery methods, unique travel benefits, etc. The authors also note that the pandemic negative consequences potentially increase national tourism importance, noting the need for a consistent policy to promote national destinations. Among the measures to counter the pandemic negative consequences, proposed in the study of Natsionalnyi Institut Stratehichnykh Doslidzhen' (2020), during the external environment transformation of Ukraine's tourism enterprises, the following is worth noting: safe area image, anti-epidemic sustainability in spatial planning; the transparent mechanism for local budgets funds received from the tourist tax exclusively for the national tourism development, related infrastructure and improving the environment.

To further assess the behavioral, institutional, social, and economic changes in products' demand and supply of national tourism enterprises, and to identify resources to increase their competitiveness, we propose the PEST-analysis or its extended version PESTEL-analysis. This standard marketing tool includes studying the following factors: social and cultural, technological, economic, political, environmental, and legal aspects. For instance, according to Kotler et al. (2017), the environment key segments where the company operates are the PESTEL-analysis elements: environment, technological environment, economic situation, political and legal environment, demographic and cultural characteristics. Because the tourism industry generates exports

and operates in the international market, this type of analysis applies to individual tourism companies and the entire local, regional, or national industry business environment (Gregoric, 2014).

In these conditions, the tourism competitiveness at the business structures level, especially in time, is closely related to improving the population living standards. Entrepreneurship development and fair competition in tourism contribute to the socially-oriented economy formation (Shapoval et al., 2018). The external environment transformation of tourism enterprises during the pandemic requires appropriate and theoretical research to forecast and create change response strategies. This research studies the external environment changes of national tourism business units by the PEST-analysis method.

Burt et al. (2006) defined PEST and its PESTEL-analysis version as an analytical multifactor model of business units' external environment, which allows this tool to achieve the research purpose.

Political factors usually include state stability, tax policy, foreign trade regulation, and policy development communities. According to Pandian et al. (2006), economic factors include the business cycle, the industry's contribution to GDP, interest rates, and inflation, and employment. Social and cultural factors are demographic indicators, income, social mobility, lifestyle changes, behavior, attitudes towards work and leisure, and education level. Technological factors include research costs, public administration, the industries' digitalization level, discoveries and development, and technology transfer rates.

Environmental factors include legislation on environmental protection, waste disposal, and energy consumption. Legal factors include anti-monopoly and anti-corruption state policy, employment legislation, and health and safety. However, the pandemic spread rate made crucial adjustments to the list of significant factors in a PEST analysis.

PEST analysis is a tool for adjusting the tourism enterprise strategy during the crisis is a powerful and widely used tool for understanding risks and opportunities. It identifies changes and the external macro-environment impact on the competitive position of business units. Strategists seek to understand external factors and assess how business models need to evolve to adapt to their environment. A preventive strategy mitigates the external factors influence, and new opportunities present new competitive positions achievable in the process. PEST analysis operates best when environmental factors are analyzed in terms of resources, capabilities, and business units (Sammur-Bonnici, 2015). It is worth emphasizing that the above factors, as a rule, do not depend or have a weak dependence on the object under study. The researching process of the external macro-environment of tourism enterprises includes a list of main stages: PEST factors identification, possible consequences analysis for the company, opportunities and threats categorization, factors prioritization, and corrective or preventive strategic action development.

Due to the research object peculiarities, it is advisable to analyze the political and legal elements of the external environment of national tourism enterprises together, within the political component, which is characterized by the following problems: continuing military conflict, restricting movement across borders related to the pandemic, lack of consistent regulatory regulation of this sphere.

Ukraine's tourism management tasks defined by the Law "On Tourism" (Zakon Ukrayiny Pro turyzm, 1995), mostly related to the central planning and tourism program implementation, while tourism marketing is generally ignored, i.e., considered as a regular industry task. Such an approach today contradicts the actual needs of tourism management. Ukraine's tourism statistics do not meet basic international standards. There are also serious problems with data collection, presentation standards, and methodology (Usov, 2020). In general, it can be concluded that the public administration

quality in tourism is relatively low, which significantly reduces the domestic tourism enterprises' competitiveness. Sammut-Bonnici et al. (2015) study confirmed the interdependence of the public administration quality and the tourism industry competitiveness level that analyzed entry tourism expenditures for 100 countries during 2002-2012 in a dynamic model.

Interestingly, Sammut-Bonnici et al. (2015) study underscore that the government's ability to formulate and effectively implement national policies has a significant and positive impact on tourism. In other words, government efficiency and regulatory quality have a significant impact on a country's income. These conclusions give grounds to make the following assumptions. First, the quality of public goods and services is an essential factor in attractiveness and some theoretical works in tourism literature (Gomez et al., 2008). Second, the government's ability to implement a regulatory framework that boosts the private sector has a significant impact, which also positively affects increasing tourist travel costs. It is also worth mentioning that these assumptions are consistent with the research results in tourism corruption (Das et al., 2010). Corruption is a significant problem for the ability of national tourism enterprises to compete in tourism. This type of crime can affect the national brand and hinder the creation of so-called "tourist magnets." Thus, corruption should be seen as a manifestation or symptom of the government's absolute inability to implement a reliable regulation system.

Kaufmann et al. (2002) define political and public administration as the government's ability to form and effectively implement state policy and strategy based on society's economic and social interactions. The public administration quality is vital as it contributes to a stable and predictable environment where the private sector, households, and investors experience stability and an incentive to expand.

Besides, moving to the economic component of the tourism enterprises' external environment, it is noteworthy that it is via tourism that some countries began to export goods and services and are now full participants in the world economy. However, today the tourism development process is significantly affected. National tourism sectors are volatile and particularly vulnerable to cyclical changes in source countries, global and regional economic conditions, and such adverse events as natural disasters, epidemics, political unrest, and terrorism (Usov, 2020). The tourism volatility reasons can be physical and geographical, such as seasonality, climate, and political and economical, which is undoubtedly particularly characteristic of countries with unstable political situations (Ridderstaat et al., 2014).

In general, the destination image is one of the key factors in changing local tourist flows. Confidence in the local economy can be paramount. Destinations with a stable positive image can attract more investors or qualified human resources. Accordingly, the military conflict in East Ukraine has significantly worsened national tourism and investment attractiveness that only exacerbated the adverse pandemic effects, which are characteristic of all national tourism industries.

Small businesses and individual entrepreneurs primarily represent the national tourism business with a much smaller margin of resilience to crises than medium and large business units (Ukrstat, 2019; Knoema, 2020). The average number of full-time employees in 2019 for legal entities did not exceed 5-8 people, and for individual entrepreneurs - 2-3 people (table 1). The average growth rate of incomes from tourist services during 2017-2019 for legal entities was 10.88%, for Individual entrepreneurs - 7.61% (Ukrstat, 2019). The lower rate of income growth of Individual entrepreneurs also indicates the greater sensitivity of small business forms to the crisis's adverse effects caused by the pandemic.

Table 1

Some economic indicators of Ukraine's tourist business environment*

| Indexes | 2017 | 2018 | 2019 | Average growth rate, % |
|--|------------|------------|------------|------------------------|
| Entities | | | | |
| Number of tourist activity entities, units | 1 743 | 1 833 | 1 910 | 4,68 |
| The average number of full-time employees, persons | 8 190 | 8 934 | 9 067 | 5,29 |
| Tourist services income (excluding VAT, excise duties, and other similar mandatory payments), thousand UAH | 18 502 975 | 21 069 269 | 22 733 741 | 10,88 |
| Individual entrepreneurs | | | | |
| Number of tourist activity entrepreneurs, units | 1 726 | 2 460 | 2 760 | 27,36 |
| The average number of full-time employees, persons | 2 101 | 2 943 | 3 038 | 21,65 |
| Tourist services income (excluding VAT, excise duties, and other similar mandatory payments), thousand UAH | 519 654 | 556 652 | 601 741 | 7,61 |

*Source: Compiled by the authors based on Ukrstat (2019).

The latest static data already confirmed the pandemic significant negative impact on Ukraine's tourism business. Thus, in the first half of 2020, the tourism industry total contribution to Ukraine's GDP amounted to 5.3% (Knoema, 2020), while during 2015-2019, given the negative impact of the military conflict in the East of Ukraine, this figure ranged from 7, 5% -8%, which was entirely in line with world indicators (Ukrstat, 2019; World Tourism Barometer, 2020).

Regarding the external environment's social factors, we believe it appropriate to consider employment in tourism in more detail, as this indicator is quite closely related to the pandemic effects; it is also worth noting the negative trends. As of the first half of 2020, the overall tourism contribution to the employment rate was 4.8%, while in 2015-2019, it was 5.5% -5.8% (Knoema, 2020). Also, it is worth noting the so-called "trend or trend aspect" (Bush, 2019). Tourism and traveling became a popular trend for the younger generation, and social media plays a significant role. Previously, tourism was mostly seen as a form of recreation or business travel; now, it becomes a means of expressing social class and purchasing power via social media (Krupskiy et al., 2015). The specialized education

role in tourism also increased significantly, and the importance of the population foreign language speaking.

Technological factors affecting the tourism industry in quarantine became crucial. Nationwide courses on the digitalization of service and customer communications cause effective marketing strategies, particularly for tourism enterprises (Sharma et al., 2020). The rapid technology development allows deepening the individualization and personalization of the offered services. The answer to such changes in the technological environment by national tourism enterprises is the personalized interfaces creation of mobile applications and sites, communication in messengers, ability to collect a significant amount of information about the customer base via social media (Mala, 2018).

To reveal the tourism potential and opportunities to increase national tourism enterprises' competitiveness, we used PEST-analysis to reflect the influence degree of external factors of different orientations and significance. Because the external environment is characterized by a high level of uncertainty and variability, quite often in its analysis, scientists apply expert methods (Gregoric, 2014). Thus, this study analyzes several stages.

At the first stage, during the scientific literature critical analysis, the author identified Ukraine's tourist enterprises' external environment's main factors. In the second stage, an expert group was involved in the evaluation, which during the brainstorming identified a list of the most significant factors and directions of their influence (stimulants/destimulators). At the third stage, during the scoring by a closed method, the experts determined the influence degree and each factor's significance level. At the fourth stage, we assessed the experts' agreement level by the concordance coefficient; the obtained data were normalized and standardized, which allowed obtaining the average values of expert assessments. In the final stage of the study, we obtained data and their clustering by direction and influence degree.

The environmental factors list of Ukraine's during the brainstorming tourist enterprises considering the secure consequences was determined during a one-time joint work of a group of experts, the so-called brainstorming, organized by Zoom online platform. Given the object's complexity and integrity under study, selecting experts' problem is one of the most difficult in peer review (Hnatiyenko, 2008). In this study, experts were both representatives of the real sector and scientists. Qualification requirements for the real sector representatives were 10+ years of experience, higher education, and subordinates directly at work. Among scientists, preference was given to the educational programs "Tourism" guarantors with scientific and pedagogical 15+

years' experience and Doctor of Economics degree. To participate in the study, we selected five experts: two representatives of middle management (heads of departments) of large tour operators in the Ukrainian market, education - higher profile, work experience - over ten years; natural person-entrepreneur who works as a travel agent, education - higher profile, work experience is fifteen years; two representatives of the teaching staff of Dnipropetrovsk region universities, who act as educational programs "Tourism" guarantors in the respective universities, scientific and pedagogical experience - more than 15 years.

Each expert previously received the environmental factors list of Ukraine's tourist enterprises compiled by the author based on a critical analysis of the relevant scientific literature. During an online discussion to assess the items' completeness and appropriateness included in the list, the experts were asked to identify 5-7 of the most significant factors jointly. According to the brainstorming results, the environmental factors' final list was formed (Table 2).

Experts used scores to determine the degree assessment and impact the probability of environmental factors. The experts assessed all external environment factors of national tourism enterprises on a five-point scale, where five is a fully expressed sign, one is the weakly or insignificantly expressed sign and distributed by the impact nature and average weighted (Table 2).

Table 2

External environment factors of tourist enterprises

| Factors | Experts (influence degree) | | | | | Average rating | Weighting/ influence direction |
|--|-----------------------------|---|---|---|---|----------------|--------------------------------|
| | 1 | 2 | 3 | 4 | 5 | | |
| 1.Political | | | | | | | |
| 1.1. International partnership development | 4 | 3 | 2 | 2 | 3 | 2,8 | 0,03/+ |
| 1.2. Administrative control ease in tourism | 5 | 4 | 4 | 5 | 5 | 4,6 | 0,04/+ |
| 1.3. Strategic planning activation of tourism activities at the national level | 5 | 4 | 4 | 4 | 5 | 4,4 | 0,05/+ |
| 1.4. Military conflict in the East | 5 | 4 | 5 | 5 | 4 | 4,6 | 0,05/- |
| 1.5. Restriction of movement across borders | 5 | 5 | 5 | 5 | 5 | 5,0 | 0,05/- |
| 1.6. The country's presence in the "red zone" during COVID-19 | 4 | 5 | 4 | 4 | 5 | 4,4 | 0,04/- |
| 1.7. Insufficient transparency of statistical studies of the COVID-19 incidence | 3 | 2 | 3 | 2 | 2 | 2,4 | 0,02/- |
| 2. Economic | | | | | | | |
| 2.1. Dynamics of exchange rates | 4 | 5 | 5 | 5 | 4 | 4,4 | 0,05/- |
| 2.2. Population Income level | 5 | 5 | 5 | 5 | 5 | 5,0 | 0,04/- |
| 2.3. The country's foreign debt | 5 | 4 | 5 | 5 | 5 | 4,8 | 0,05/- |
| 2.4. Declining demand for services during a pandemic | 4 | 5 | 5 | 4 | 5 | 4,6 | 0,05/- |
| 2.5. Increasing interest in domestic tourism because of the restrictions on border crossing | 5 | 4 | 4 | 4 | 4 | 4,8 | 0,05/+ |
| 2.6. Tax benefits for sole proprietors for the period of quarantine, suspension of penalties and fines | 3 | 2 | 2 | 2 | 2 | 2,2 | 0,02/+ |
| 3. Social | | | | | | | |
| 3.1. Population growth rate | 2 | 2 | 3 | 3 | 3 | 2,6 | 0,02/- |
| 3.2. Population education level | 4 | 5 | 5 | 4 | 5 | 4,6 | 0,04/- |
| 3.3. Foreign languages | 3 | 2 | 2 | 4 | 3 | 2,8 | 0,03/- |
| 3.4. Changes in the structure of the urban and rural population | 4 | 4 | 4 | 3 | 2 | 3,4 | 0,03/+ |
| 3.5. Employment rate (pandemic decline) | 3 | 4 | 4 | 4 | 3 | 3,6 | 0,04/- |
| 3.6. Consumer expectations of the population | 3 | 2 | 2 | 2 | 4 | 2,6 | 0,03/- |
| 3.7. Changes in the behavioral reactions of tourist services consumers | 4 | 3 | 2 | 2 | 2 | 2,6 | 0,03/- |
| 4. Scientific and technical factors | | | | | | | |
| 4.1. National course on administrative services digitalization | 4 | 4 | 4 | 4 | 5 | 4,2 | 0,04/+ |
| 4.2. The technologies application level in the industry | 3 | 2 | 2 | 2 | 2 | 2,2 | 0,03/- |
| 4.3. Customer service individualization | 4 | 3 | 2 | 2 | 2 | 2,6 | 0,03/- |
| 4.4. Electronic marketing tools application | 5 | 5 | 4 | 4 | 4 | 4,4 | 0,05/+ |
| 4.5. Possibility to introduce remote/distance form of service provision | 5 | 5 | 5 | 5 | 5 | 5,0 | 0,05/+ |
| 4.6. Introduction of logistics and service systems for customer self-service | 5 | 4 | 4 | 5 | 5 | 4,6 | 0,05/+ |
| TOTAL: | | | | | | 99,2 | 1 |

*Source: Compiled by the author based on the results of an expert survey and by Horal et al. (2015), Horina (2016), Gössling et al. (2020); Gregoric (2014); Komlichenko (2014); Katsemir et al. (2016).

When evaluating the research objects, the experts often disagree on the problem to be solved. In this regard, there is a need for a quantitative assessment of the experts' consistency degree (Prisenko, 2005). We determined the agreement level between the

experts' views via the concordance coefficient (Equation 1). The expert evaluation results are considered statistically significant at $W > 0.55$.

$$W = \frac{12S}{d^2(m^3 - m) - d \sum_{s=1}^d T_s}, \quad (1)$$

wherein S is the sum of the deviations' squares of all ranks estimates of each object from the average value; d is the number of experts; n is the number of objects, T_s is an indicator of related ranks in the s -th ranking. The estimated concordance coefficient was 0.611 and is therefore significant, and the experts' opinions are consistent.

The estimates given by the experts were standardized and averaged. Each was assigned a weighting factor. In addition to the generally accepted environmental factors, the experts were also offered a list of specific features related to the crisis caused by the COVID-19 pandemic and quarantine measures, such as logistics and self-service systems, adverse changes in consumer expectations of the population.

All selected indicators were distributed according to the impact nature of tourism enterprises' external environment, respectively, on stimulants and disincentives (Pluta, 1980; Obelnytska, 2016). As we can see from Fig. 1, in Ukraine's tourist enterprises' external environment, there is a clustering of factors that are grouped by direction and significance of the impact and form conditional groups of significant negative and positive impact. We also have the opportunity to identify a list of factors, which strengthening in the future has a positive impact on improving the competitiveness of Ukraine's tourism enterprises in the relevant market. Thus, in the upper left quadrant, eight factors have the most significant negative impact, while in the upper right quadrant - factors that positively affect the studied objects' external environment and thus contribute to the competitiveness of tourism business-units.

Adverse factors include political - a military conflict in the East of Ukraine, restrictions on movement across borders, the country's presence in the "red zone" during the COVID-19; economic - the exchange rates dynamics, income levels, the country's external debt, declining demand for services during the pandemic, social - the education level, employment (fall during the pandemic).

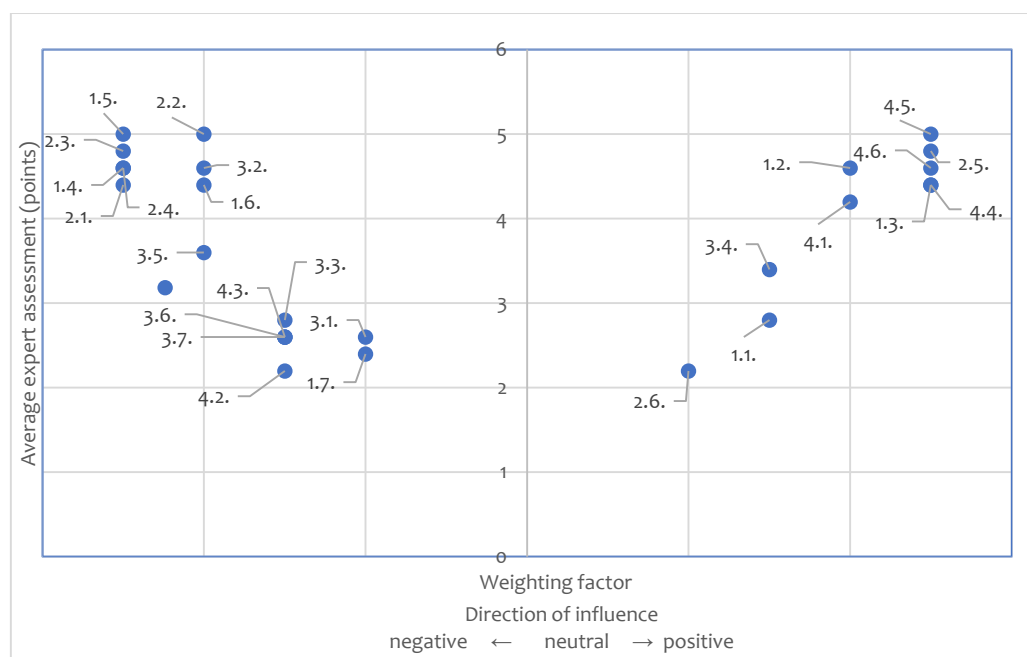


Fig. 1. Environmental factors distribution of tourist enterprises*

*Source: compiled by the authors.

Among the factors with the most significant positive impact we can note political - intensification in the strategic tourism planning at the national level and administrative control ease in tourism, economic - increasing interest in national tourism due to restrictions on border crossing, technological - national course on administrative services digitalization, digital marketing tools, the possibility of remote/distance form of rendering services.

5. Conclusions

Based on the PEST analysis results, we identified critical factors in Ukraine's tourism enterprises' external environment, including the pandemic negative consequences. The factors' choice also covers their impact direction and weighted average ponderability that allowed identifying the most significant negative and positive components of Ukraine's tourism enterprises' external environment.

In the economic activity strategic planning of tourism business units at the national and regional levels, one should focus on increasing the importance of the environmental factors in the lower right quadrant, namely: international partnerships

development, tax benefits for individual entrepreneurs in tourism, changes in population structure. Thus, in the research, we identified a reserve for increasing Ukraine's tourist enterprises' competitiveness in the industry market based on including additional factors of their external environment.

This paper research results provide a basis for further study of the external micro-environment of tourism enterprises at the local, regional, and national levels, both in retrospect and in the future during the crisis.

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7. The competing interests

The authors declare that they have no competing interests.

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